



Create a User Defined Field

Accounting Specialists and **Card Administrators** can create user defined fields (UDFs) by complete the following steps.

1. Click the **Administration** tab.
2. From the **Manage Organizations** menu, select **User Defined Fields** and click **Modify**. The *Select OTC Endpoint* screen appears.
3. Select the highest level organization for which you want to modify UDFs. The *Step 1 of 3: Select User Defined Field to Maintain* page appears.
4. Click the **Create UDF**. The *Step 2 of 3: Modify the User Defined Field* page appears.



Application Tip

A message is displayed discouraging users from creating UDFs that request personally identifiable information (PII) data.

5. Add the UDF and click **Done**.

You can add a UDF by:

- Selecting the **Activity** type for the UDF



Application Tip

There are two types of deposit processing activities (**Create Deposit** and **Create Deposit Subtotal**) and one activity for card processing (**Create Card Processing**).

For TGA/CDC Endpoints with active deposits, in the drop-down **Activity** menu, the deposit activities will be disabled. In this case, **Accounting Specialists** and **Card Administrators** can only select the **Create Card Processing** activity.

- Entering the **Label** and **Description**
- Selecting a **Data Type**
 - If the **Drop Down List of Alphanumeric Values** Data Type is selected, proceed to step 6.
 - If another **Data Type** is selected, continue entering in information for the fields below and then proceed to step 7.
- Entering the
 - **Maximum Input Length** (Maximum length is 255)

- **Minimum Input Length**
- **Display Order Number**
- Selecting **Mandatory** or **Optional** for Activity User Entry



Application Tip

Note: When a deposit is in progress at a TGA or CDC endpoint, a UDF cannot be modified or deleted if the deposit is in **Draft** or **Awaiting Approval (AWAP)** status. If the **Accounting Specialist** or **Card Administrator** has selected an endpoint that is both a TGA, and a CDC Endpoint and this endpoint has a deposit that is currently in progress, the deposit processing activities will be disabled to read-only. Only the **Card Processing** activity will be active. The **Card Administrator** can continue card processing activities when a deposit is in progress.



Application Tip

If the **Drop Down List of Alphanumeric** values data type is selected a **Permitted Values** section appears. Click **List Values**. A *Step 2 of 3 (Continued): Define Permitted Values* page appears. Enter details for both the **Value** and **Description** and click **Done** to return to the *Step 2 of 3: Modify the User Defined Field* page.

6. The *Step 1 of 3: Select User Defined Field to Maintain* page appears again. Select **Next**.
7. The *Step 3 of 3: Review* page appears. Verify the UDF information is correct. Select the plus sign next to the UDF to expand it.
8. The *Step 3 of 3: Review* page appears. Verify the UDF information is correct and click **Submit**. A confirmation page appears showing that the UDF data has been saved to the database.



Application Tip

Click **Edit** to make additional changes before submitting the information and return to Step 5.



Application Tip

Additional buttons on the page help you perform other tasks:

- Click **Cancel** to return to the OTCnet Home Page. No data will be saved.
- Click **Edit** if you need to make additional changes.
- Click **Next** to advance to the next page.
- Click **Previous** to return to the previous page.
- Click **Return Home** to return to the OTCnet Home Page.